Goldilocks CRM: Tasks

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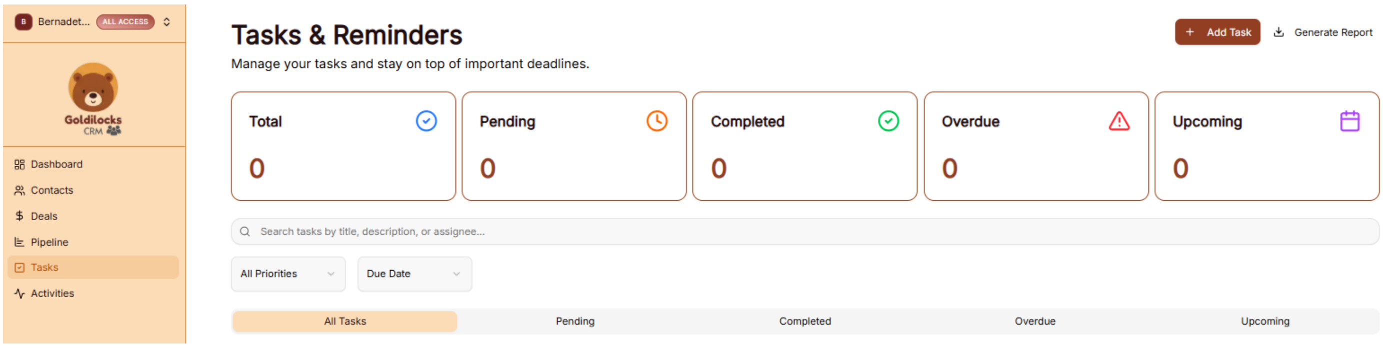


The Tasks module allows you to manage your daily to-do lists and stay on top of important project deadlines.

Tasks Dashboard Overview

The main dashboard provides a high-level summary of your current workload through five key metric cards:

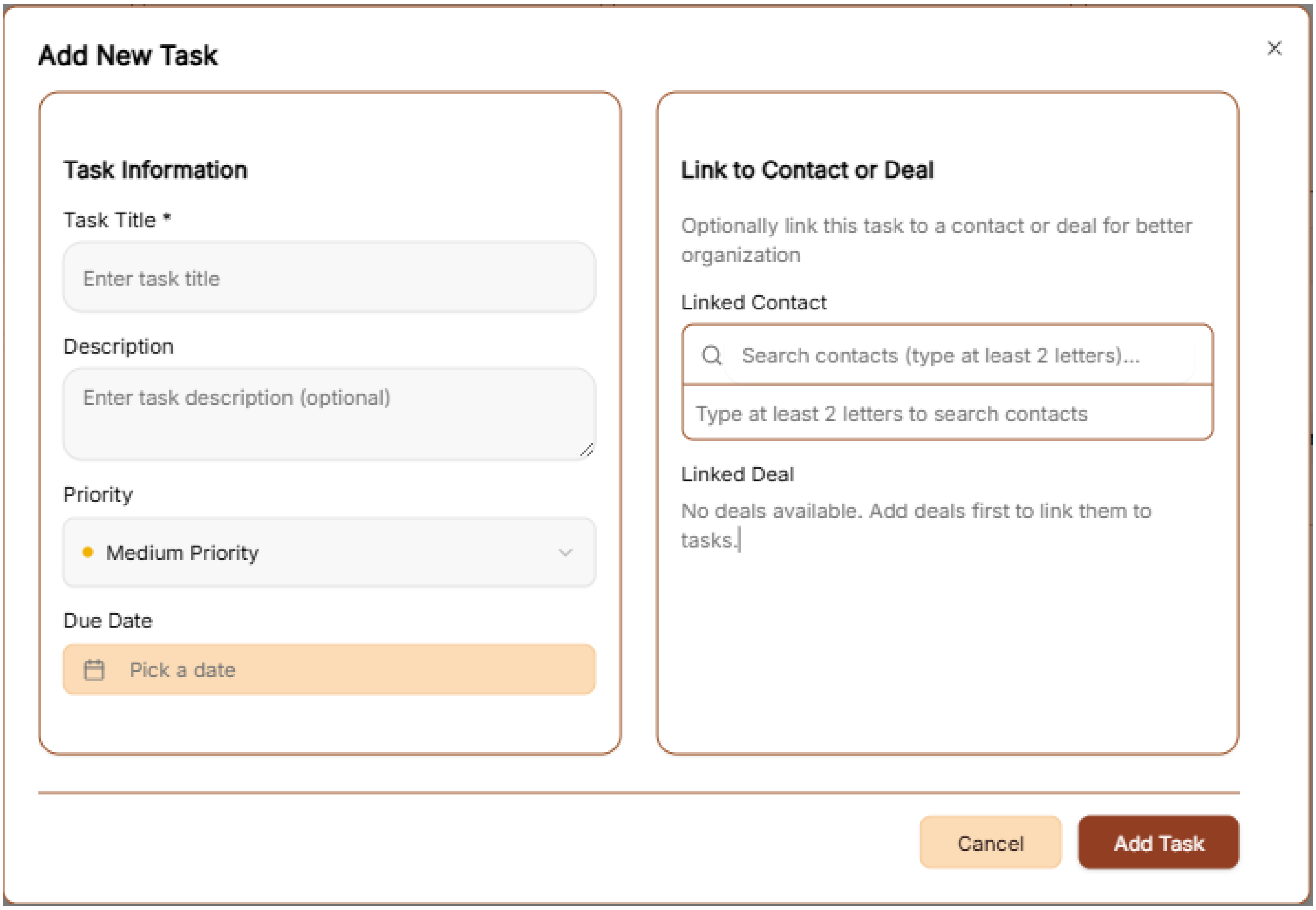
- Total: The overall count of all tasks assigned to you.
- Pending: Tasks that are currently open and awaiting action.
- Completed: A count of all finalized tasks.
- Overdue: Tasks that have passed their assigned due date without being completed.
- Upcoming: A look-ahead at tasks scheduled for the near future.

Managing Your Task List

You can organize and find specific tasks using the following tools:

- Search Bar: Locate tasks quickly by searching for their title, description, or the assigned team member.
- Filtering: Narrow your view by using the All Priorities or Due Date dropdown menus.
- Quick View Tabs: Switch between status-specific lists, including All Tasks, Pending, Completed, Overdue, and Upcoming.

Adding a New Task



To create a new entry, click the brown + Add Task button at the top right of the screen. This opens the Add New Task window:

Task Information:

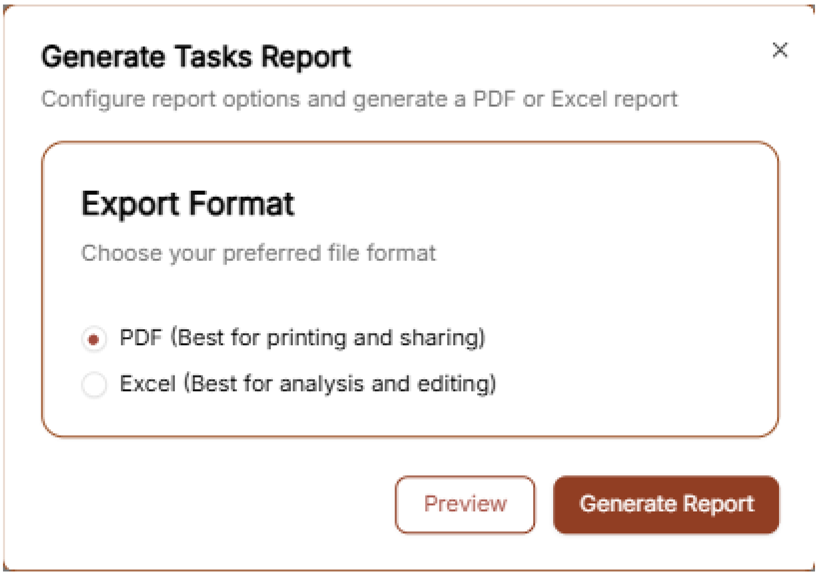
- Task Title: Enter a clear, concise name for the task.
- Description: Add optional details or specific instructions for the task.
- Priority: Use the dropdown to set the importance level (e.g., Medium Priority).

- Due Date: Click the calendar icon to pick a specific deadline.

Connections & Finalization:

- Link to Contact or Deal: Optionally link the task to a specific person or sales opportunity for better organization.
- Save: Click the brown Add Task button at the bottom right to save the task to your list.

Generating a Tasks Report



To export your current task data, click the Generate Report link in the top right corner.

- Choose Format: Select either PDF (best for printing/sharing) or Excel (best for data analysis).
- Finalize: Click Preview to check the layout or Generate Report to download the file.

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